

Central Intelligence Agency



Washington, D. C. 20505

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DIRECTORATE OF INTELLIGENCE

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Afghanistan: Food Situation Remains Precarious []

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Summary

Adequate food supplies probably are available in most areas of Afghanistan to meet minimum requirements, but the war-disrupted distribution system, crop failures, and combat operations have created spot shortages--especially in the northeast and east--and pushed up prices. Unfavorable weather and five years of war suggest that the prospects for maintaining current levels of domestic food production in 1985 in much of the country are deteriorating, and the population is likely to become increasingly dependent on the Kabul market and imports from Pakistan. []

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Domestic Food Production

Although the Afghan Government claimed that food production increased last year, we believe production of wheat, the country's most important food grain, was about 10 percent below the level of 1983. Grain crops suffered moderate damage, mainly in the northern plains regions, because of a shortage of rainfall. []

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The disruptions caused by the war are making the outlook for the already fragile agricultural economy more precarious. Lack of manpower to prepare the

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soil for planting, poor quality seeds, and unavailable or overly expensive fertilizer are all contributing to a deterioration of the country's food producing capability. Food production prospects are particularly uncertain in Hazarajat, Vardak, Ghazni, Paktia and other provinces along the eastern border, [redacted] Agricultural activity appears least affected by the war in the northern provinces although information on food conditions in western Afghanistan is sketchy. [redacted]

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The availability of water remains the critical ingredient for food production. Snowfall in the north this winter was less than normal for the second year in a row, but widespread rains in March, April, and May have temporarily replenished critically low water supplies. We believe sufficient water is available to sustain the winter wheat crop until harvest. Prospects for the summer crops, particularly in the north, are less promising because the amount of water for irrigation later this year probably will be less than normal. [redacted]

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[redacted] agricultural prospects in the south for this spring and summer are good because of adequate snowfall. Insurgent and tribal leaders in the south have been encouraging refugees in Pakistan to return and help with the planting and harvesting, particularly in Qandahar Province and the Helmand Valley. The movement of Afghan workers from Pakistan to Afghanistan during the planting and harvesting seasons is an important source of agricultural labor, particularly in the south. Several areas that have been deserted because of fighting or air attacks are worked mainly by these migrants. [redacted]

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Food Prices Continue To Rise

Food prices throughout Afghanistan have climbed rapidly in the past five years--averaging an increase of more than 25 percent annually--but no faster than nonfood items, according to spot price surveys taken by the US Embassy and travelers in the countryside and official government statistics. Fragmentary reporting indicates prices vary widely from province to province depending on the degree of self-sufficiency in the area and whether the survey was taken before or after the harvest. Kabul food price increases generally have been much more modest than in the rural areas, primarily because the sizable Soviet food deliveries to the capital ensure a degree of normality in daily life. [redacted]

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Imports Remain Critical

Afghanistan remains highly dependent on imports to meet the gap between domestic production and consumption. We estimate that about 400,000 tons of wheat have been brought into Afghanistan annually since 1981--slightly more than half from the USSR and the rest from Pakistan. [redacted]

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[redacted] most of the Soviet grain is sent to Kabul and to other major cities. [redacted]

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[redacted]

A review of Soviet trade statistics and aid agreements indicates the Soviets have been delivering to Afghanistan about 225,000 tons of wheat annually for the past few years (see table). Soviet wheat is provided through sales and grant agreements. Soviet sales were about 30,000 tons annually prior to the invasion, and have been averaging about 100,000 tons annually the

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past few years. Data on Soviet wheat sales in 1984 is not yet available.

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Table

Estimates of Soviet Wheat Deliveries to Afghanistan

<u>Year</u>	<u>Sales^a</u>	<u>Metric Tons</u> <u>Grants^b</u>
1978	30,000	None Reported
1979	30,000	100,000
1980	30,000	140,000
1981	80,000	150,000
1982	125,000	100,000
1983	80,000	N/A
1984	N/A	N/A

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^aBased on the value of wheat sales to Afghanistan reported in Soviet trade statistics.

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The Soviets began to supply 100,000 to 150,000 tons of wheat annually as grant aid in the late 1970s. Available information does not give us the quantity of wheat delivered as a grant in 1983 or 1984, but agreements for general commodity grants in those two years show no overall decline. Recent reports of plentiful food supplies in Kabul also lead us to believe the Soviets are maintaining a high level of wheat deliveries.

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We believe imports alleviate shortages in most of those rural areas where domestic supplies are insufficient, particularly near the border with Pakistan. Western observers have estimated that 140,000 to 180,000 tons of wheat are brought in annually from Pakistan through unofficial channels. Sufficient information is not available to measure the direction or magnitude of changes from year to year. The US Embassy in Kabul assumes that a large share of these supplies is diverted from the refugee camps in Pakistan, but the Afghans also purchase surplus grain from the Pakistanis. We have little information on food trade along the Iran-Afghanistan border.

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The second consecutive poor wheat crop in Pakistan will result in less surplus grain for export to Afghanistan. The Pakistan government will need to import 2 million tons of wheat over the next year to meet domestic demand and replace drawdowns of its own stockpile, but we do not anticipate major shortages. [REDACTED]

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Budgetary constraints and pressing needs in Africa are slowing down donor contributions of food for the refugees. Donor pledges are only about 50 percent of the World Food Program's target level of 400,000 tons for 1985--a level the Pakistanis believe is inadequate. Pakistan has not been reimbursed for about 23,000 tons of wheat above the WFP's 400,000 ton quota that it reportedly delivered to the refugees last year. If wheat donations are maintained at the programmed level, there will be less food for the camps--and possibly less for transshipment to Afghanistan and Pakistan may have to draw from its own stocks to make up for the shortfall. [REDACTED]

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Outlook

Timely and widespread rains this spring may have averted a major shortfall in wheat production this year. Prospects for summer crops are less promising because the amount of water available for irrigation is likely to be less than normal. Poor crops this summer combined with upward pressures on food prices resulting from increased transportation costs and general inflation will exacerbate the food situation in the northeast and east. The lower grain harvest last year reduced local grain reserves, which were meager at best, and increased the importance of agricultural output this year. Five years of economic disruption have depleted farmers' savings and more families are becoming dependent on remittances from relatives in Pakistan or the Gulf States for money to buy food [REDACTED] Those areas in the north, around Kabul, and near the border with Pakistan will be able to get adequate food supplies albeit at higher prices. [REDACTED]

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